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ABSTRACT

This workbook outlines the Salem Community College's (New Jersey) Strategic Planning Initiative (SPI), which will enable the college to enter the 21st Century as an active agent in the educational advancement of the Salem community. SPI will allow college faculty, staff, students, and the local community to reflect on the vitality of the college and its current and future relationship with all of its stakeholders. The strategic planning process will establish a set of eight planning teams: (1) academic assessment and program review; (2) community/customized education; (3) enrollment management and recruitment; (4) facilities; (5) financial planning; (6) information technology; (7) institutional advancement; and (8) student retention. Included in the workbook are four sections: (1) overview of the strategic planning process; (2) vision, mission evaluation and development; (3) meeting guidelines for strategic planning, which include information gathering and exploring, identifying and assessing alternative actions, creating criteria for choosing alternatives for action, and proposal development and planning; and (4) strategic plan format (template). Appendices A through D provide general expectations and principles that guide the planning process, a glossary of SCC strategic planning, tips on writing proposals and plans, and a sample meeting evaluation form. (AS)

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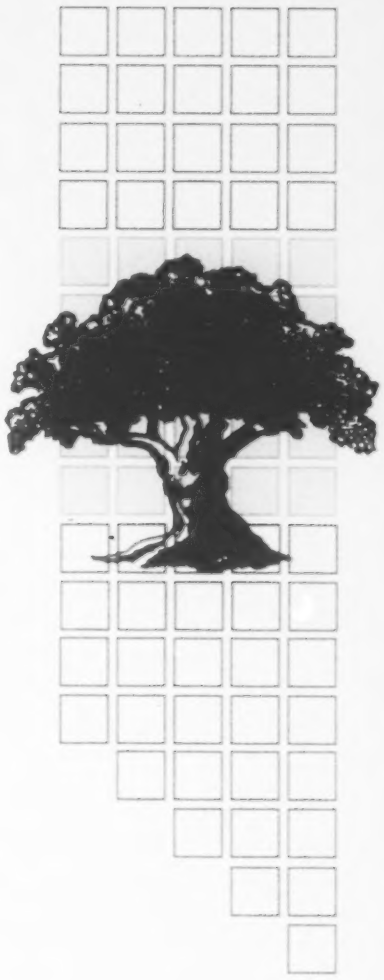
Salem Community College



A Strategic Planning Workbook

William Austin, Director
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VISION
A DIRECTION OR PATH THAT SETS THE PACE FOR EXCELLENCE IN AN ORGANIZATION. WHAT YOU HOPE TO ACHIEVE
MISSION
A DESCRIPTION OF THE SERVICE PROVIDED, THE TASK FACED, WHO WE SERVICE, THE FORCES WE HAVE TO CONTRIBUTE, AND THE MEDIUM IN WHICH WE OPERATE. OUR DAY TO DAY JOB
GOALS
THE ESTABLISHMENT OF SPECIFIC TARGETS
STRATEGIES / OBJECTIVES
DEVISING WAYS TO MEET YOUR GOALS

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Purpose of Strategic Planning

The purpose of Salem Community College's strategic planning initiative is to develop a process that will allow the college to enter the 21st Century as an active agent in the educational advancement of the Salem County community. Strategic Planning will allow college faculty, staff, students and the local community to diligently reflect on the vitality of SCC and its current and future relationship with all of its stakeholders.

The strategic planning process will empower the college community to reflect on the past, present, and future of the college and to discuss its vision, mission, and goals. The college will work through a collaborative process to evaluate the current vision, mission, goals, strategies, as well as institutional effectiveness, current programs and academic assessment, retention and recruitment strategies, marketing, technology, facilities, and financial considerations. SCC planners will work to evaluate the structures currently in place and will recommend necessary changes, improvements, developments, and enhancements in light of the strategic plan.

Strategic planning is a process of formulating long-range planning for our organization, Salem Community College. There is no single definition for strategic planning, and no two processes should be alike. However, for the sake of a common understanding, the college will adopt a combined definition from Peter Drucker and William Austin:

> *Strategic planning is the continual process of making entrepreneurial (risk-taking) decisions systematically and with the greatest knowledge of their futurity; organizing systematically the efforts needed to carry out these decisions; and measuring the results of these decisions against the expectations through systematic feedback* (Drucker, 1973). *Strategic planning is best accomplished when plans are tied to the mission of the organization, involve a large number of the stakeholders, are data driven, and emerge from an arena of consensus that is cross-institutional and heterarchical in authority.* (Austin, 1999)

Strategic planning typically results in a formal, written, structured, strategic plan that charts the organization's future course. However a distinction should be made between the college's strategic planning process and subsequent strategic plan. The two terms are not synonymous and it is important to know that this activity requires both a formal process (detailed within this workbook) and a formal written plan (the formal outcome of the strategic planning process). (Jurinski, 1993, p. 1).

Part #1: Overview of SCC Strategic Planning Process

Overview

The strategic planning process will establish a set of eight planning teams:

1. Academic Assessment and Program Review
2. Community/Customized Education
3. Enrollment Management and Recruitment
4. Facilities
5. Financial Planning
6. Information Technology
7. Institutional Advancement
8. Student Retention.

Each of these planning teams will consist at least of a chairperson from the college senior staff as well as a member of the Board of Trustees, a faculty member, a professional/administrative staff member, a support staff member, a student, and a member of the larger Salem County community. These teams will meet throughout the months of February 1999 through May 1999 to complete the strategic planning process defined within this document.

Each planning team will work toward establishing an area of concentration for the college-wide strategic plan. Teams will work toward the development and analysis of the internal and external environments, an understanding of the current situation and strategic alternatives, development of a supportive climate at the college, a multi-level collaboration of ideas, and toward the development of interactive planning networks with cross institutional responsibility and cross departmental resource sharing. The outcome of the planning process will include a formal document, the SCC Strategic Plan, that will be implemented over the next three to five years.

Strategic planning will benefit Salem Community College by minimizing the element of surprise, while maximizing the ability of college decision makers to manage change effectively and efficiently. Strategic planning allows for the change in institutional management from a reactive enterprise to one of action. It creates a better understanding of competition, the external economic environment, and ensures that the college will work more efficiently toward achieving its goals. Strategic planning can help identify

potential internal problems on paper, before action must be taken. Finally, strategic planning is a mechanism for continually measuring performance against established standards. To this end, it may serve as a valuable communications tool that provides each stakeholder with a common base of information and expectations.

Salem Community College has a long-established tradition of strategic planning; this process is the next step in an evolution of planning. It is necessary, and will be a continuous process of change and organizational development.

Timeline

Strategic Planning Kickoff

State of the College Dinner – Friday, Feb. 5, 1999 (5:30-8:00 PM)
Vision & Mission Evaluation – Sat., Feb. 6, 1999 (8:30 AM – 11:00 AM)
Workbook Training – Sat., Feb. 6, 1999 (12:00 PM – 3:00 PM)

- SWOT
- Consensus
- Final Plan Format

Vision, Mission Evaluation & Development **(Page #9)**

Planning Team Meeting (2 Hours) – Determined by Team, Prior to 2/25/99
Team Chairs, Board Meeting – Board Meeting (2/25/99)

Stage #1: Information Gathering & Exploring **(Page #15)**

Planning Team Meetings – Determined by Planning Teams

(Two meetings 2-3 hours in length; or whatever is necessary to complete task)

Stage #2: Identifying and Assessing Alternatives for Action **(Page #18)**

Planning Team Meetings – Determined by Planning Teams

(One or two meetings 2-3 hours in length; or whatever is necessary to complete task)

Report of Progress by Chairs to President and Board of Trustees (3/25/99)

Stages #1 and #2 should be completed.

Stage #3: Creation of Criteria for Choosing Alternatives for Action **(Page #20)**

Planning Team Meetings – Determined by Planning Teams

(Two meetings 2-3 hours in length; or whatever is necessary to complete task)

Stage #4: Proposal Development & Planning **(Page #23)**

Planning Team Meetings – Determined by Planning Teams

(Two to three meetings 2-3 hours in length; or whatever is necessary to complete task; completed by no later than 4/22/99)

Report of Progress by Chairs and First Draft delivered to President and Board of Trustees (4/22/99)

Stages #1-#4 Completed; initial draft of Planning Team plans presented.

First Draft of SCC Strategic Plan Summarized from Team Drafts and Returned to Planning Teams as One Document (5/3/99) **(Page #26)**

Planning Teams Review Draft and Present Comments via Chair to Board of Trustees (5/27/99)

SCC Strategic Plan Finalized and Presented to College June 14, 1999

Plan Implementation Begins Through Formalized Departmental Planning September 1999

Preparation Guidelines

All staff persons at Salem Community College will be asked to volunteer as Planning Team members as a way to enhance both the departmental and institutional levels of the college. Strategic planning effectiveness relies on certain essential preparations. These are:

A. Personal level preparations

- Open minded and voluntary readiness to participate in process.
- Consideration of personal reasons for joining a planning team.
- Identification of personal goals for SCC strategic planning.
- Willingness to work beyond the departmental level.
- Understanding that strategic planning is not just an addition to my current job, but is already an essential element of my current work.

B. Departmental and College level preparations

- Alerting of supervisors to staff participation & time considerations.
- Consider readiness of individual volunteers to participate.
- Determination of time schedule to complete process.
- Identify major opportunities and threats that could be encountered as part of the process.

To assist in this preparation of the Planning Teams, SCC will host a kickoff weekend planning orientation. The first night will consist of a catered dinner, and a statistical summary of the College at this time. This "State of the College" presentation will review relevant statistics, identify the broad long-term objectives of the strategic planning process, and orient planning team members to the task at hand. The Saturday orientation will begin with light refreshments, proceed with an evaluation of the current vision and mission of SCC. Following lunch, the afternoon session will review this workbook and answer any questions before the teams proceed.

Part #2: Vision, Mission Evaluation & Development

Scott Adams, in his book The Dilbert Principle, defines a mission statement as "a long awkward sentence that demonstrates management's inability to think clearly." (Adams, 1996, p. 36). Juranski defines a mission statement as a brief, general description of the direction a company is taking. In strategic planning, vision, mission, and mission statements are often confounded and confusing. For SCC, a mission will be defined as a description of the task we face and the service we offer, who we service, the forces we have to contribute, and the medium in which we operate (i.e., our day-to-day job). The mission statement should consist of no more than a few sentences that articulates our mission to our stakeholders.

In addition, a vision will be defined as the direction or path that sets the pace for excellence in our organization (i.e., what we hope to achieve). Goals will be the specific targets we hope to meet, and strategies or objectives will be the mechanism we devise to meet our goals. Note well, that each of these are separate components; good mission and vision statements do not contain specific details about the objectives that will be reached, who does the work, or how much it will cost. These are the details that are defined in the strategic plan. The following are some examples of mission statements from some major organizations:

1. "Our business is service." -- AT&T
2. "...to be the best service organization in the world" – IBM
3. "To be the pre-eminent collector and provider of timely, relevant and quality data about the people and economy of the United States." – US Census
4. "We support the President, the National Security Council, and all who make and execute US national security policy by: 1) providing accurate, evidence-based, comprehensive, and timely foreign intelligence related to national security; and 2) conducting counterintelligence activities, special activities, and other functions related to foreign intelligence and national security as directed by the President." -- CIA

The following are Salem Community College's current vision, mission, and goal statements:

Vision Statement

"To be the best small rural community college in the nation."

Mission Statement

"Salem Community College is a public, two-year institution of higher education authorized by the state of New Jersey to grant associate degrees and certificates in a variety of academic and technological disciplines. Salem Community College believes that learning is the most important factor in the development of human potential and the advancement of society.

It is the mission of Salem Community College to make quality academic, technical, social, cultural, and occupational programs accessible to all who demonstrate the desire to learn and are able to benefit from instruction.

Further, Salem Community College is committed to creating and maintaining affordable educational programs which are responsive to the ever-evolving needs of the individual student, regional business and industry, and the community at large. Additionally, the college seeks to enhance formal instruction with appropriate academic, social, cultural, recreational, and guidance support systems which contribute to the development of the "whole" person while enriching the entire community which the college serves."

Goal Statements

1. Seek institutional excellence by encouraging and supporting students, faculty, administrators, and staff in their pursuit of personal and professional growth;
2. Value the inherent worth of each individual by encouraging increased levels of trust, mutual respect, personal responsibility, fairness, and appreciation of cultural differences;
3. Facilitate shared decision-making by encouraging full participation in the college's governance process;
4. Foster fiscal responsibility by effectively managing college resources and seeking additional resources through external funding;
5. Reflect the community which the college serves by striving for diversity of race, ethnicity, gender, and age among faculty, administrators, and staff.

6. Evaluate the college's Mission and Goals on an ongoing basis by periodic identification of the needs of the local and regional populations served by the college;

7. Promote learning by offering high quality, performance-based programs which reflect current technological advances;

8. Foster an atmosphere of learning by emphasizing the establishment of goals, stressing critical and creative thinking skills, encouraging innovative teaching styles, and examining personal value systems;

9. Prepare students for entry level positions and professional advancement by offering quality career and technical programs;

10. Promote learning by encouraging meaningful interaction and support among and between students, faculty, administrators, and staff;

11. Facilitate the maximum transfer of credits for students who seek education beyond the associate degree by negotiating transfer articulation agreements;

12. Enhance the social, recreational, and cultural life of the county by providing a variety of activities which emphasize mutual cooperation, athletic competition, community service, and an appreciation of the arts;

13. Foster partnerships by building collaborative programs with business, industry, and government as well as with other institutions and secondary schools;

14. Facilitate access to higher education for all individuals, regardless of disability or disadvantage, by providing academic assessment, career counseling, developmental programs, financial aid counseling, and support services;

15. Provide lifelong learning experiences by designing and providing continuing education programs which reflect the needs of the community;

16. Promote educational outreach by establishing and maintaining community education centers.

Vision 2000 Objectives

1. Increase student enrollment to 1,500 or comparable credit hours of 13,200 (both full and part time) by fall registration 2000.

   This equates to a ratio or capture rate of 2.2% of the County's population and will put us on par with other community colleges in the region and state.

2. Increase revenues from Industrial and Customized training to a minimum of $550,000 in FY2000/01.
3. Correct and/or complete ALL 1997 Middle States recommendations, and complete the Middle States Periodic Review in June 2000, obtaining a rating of confirmation without reservations.
4. Maintain and upgrade facilities, grounds, educational technology, & employee training in a manner which meets the quality needs of our planned programs and services while enhancing our growth and expansion.
5. By June 2000, ensure that the students' share of cost is one third.
6. By June 2000, have a system in place and fully operable which establishes goals, has a monitoring component including measures that are accepted and understood by all

which ensures that our services and programs are being delivered in a manner consistent with our vision and growth plans.

7. By September 1, 1998 review all operating processes and determine which of those will undergo mapping techniques for upgrading to be completed by April 1, 1999.

Upon a reflection of these statements, the Planning Teams will complete a series of worksheets (Worksheets #1 & #2, pp. 15 &16). These worksheets will measure and evaluate the current vision and mission of the College, the goals will be evaluated as part of the larger planning process. These sheets are designed to give the planning teams the framework and ability to suggest changes to the current statements. As part of the morning exercise, Planning Teams will complete and discuss Worksheets #1 and #2; the final results of this section will be completed at a later meeting, and subsequently discussed at the February Board of Trustee's meeting.

The vision of the college should be a direction or path that sets the pace for excellence in the organization. It should be that which the college hopes to achieve. Henry M. Boettinger, retired Director of Corporate Planning at AT&T states that: "To manage is to lead, and to lead others requires that one enlist the emotions of others to share a **vision** as their own." To this end, please review our Vision Statement and answer the following questions:

- Is this vision shared by all stakeholders?
- Would you say that we share a common unspoken vision?
- Do individuals have differing visions?
- Do departments have differing visions?
- Do we share a common language?
- What are the barriers to a common language and a common vision?

In addition to examining the vision, mission evaluation is crucial to the strategic planning process, in that, it will set a major mark for the Planning Teams to base criteria for action upon. The mission of an organization is critical to the measurement of its success. To be truly effective, a mission and mission statement must tell us who we are, and we as stakeholders must believe it. Unfortunately, the vast majority of mission statements currently in use are leading their organizations in the same fashion that a hood ornament leads a car. How would you rate Salem Community College's mission statement in terms of this metaphor?

Proceed to Worksheet #1 (p. 15)

After you have completed Worksheet #1, review your response and repeat the steps substituting vision for mission and please answer the following questions:

1) Is our Vision, and Mission an asset to our college?
2) Should we keep or change the current Vision?
3) Should we keep or change the current Mission?
4) Is there room for improvement in our current mission or should we begin again?

If you believe the college would improve by a re-development of the Vision and Mission, please proceed to Worksheet #2 (p. 16).

After you have completed Worksheet #2, answer the following question:

Using the ideas and concepts you developed in Worksheet #2, please write a vision and mission statement for Salem Community College in the space below. If you accept the current vision or mission statements, see if you can improve upon them.

Complete proceeding task both as an individual and within the context of your Planning Team. Repeat the exercise for the Vision statement below as well. Deliver via chair to Board of Trustee's Meeting 2/25/99.

MISSION STATEMENT

Worksheet #1: Recognize the Perceptions[1]

Rate SCC from 0 (lowest) to 5 (highest) on the following:

_____ Our mission includes elements that will endure beyond the tenure of anyone currently working here.

_____ We are very careful not to confuse our mission with our mission statement.

_____ We developed our mission completely before trying to write a mission statement.

_____ We don't try to substitute strategies, plans, and goals for mission.

_____ All employees gave input to the development of the mission (1 if 20%, 2 if 40%, etc.)

_____ Our Mission could easily be understood by a twelve year old.

_____ After thirty days of working at SCC, each employee can passionately articulate the mission in their own words.

_____ Our employees think our mission is worthy.

_____ Our mission is achievable in total as well as in parts.

_____ Our students and suppliers know, understand, and agree with our mission (again, ask them).

_____ The public we serve, know and understand our mission.

_____ Our mission clearly differentiates us from our competitors.

_____ We refuse to borrow our mission from anyone or buy it from a consultant.

_____ Our mission is a declaration of what we want to be, not a statement of what we think others expect us to be.

_____ Our mission has the passion to make people excel, work harder, and develop professionally.

_____ We really believe that we could not operate successfully without a mission or a mission statement.

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[1] *Revised from Lucas, J. (1997). Fatal Illusions. New York: American Management Association.*

MISSION STATEMENT

Worksheet #2: Identifying College Characteristics[2]

1. What overall business are we in and what business are we likely to be in five years from now ?

2. What are our most important services?

3. What will our most important services be in the next five years?

4. Who are our most important customers?

5. Why or how are we different from our main competitors?

6. How has the way we provide service changed over the past five years?

7. How do we think our business will change over the next five years?

8. What special duties or services do we owe to our stakeholders?

9. How do we judge the college's ultimate success? Why are we in existence?

[2] *Revised from Juranski, J. (1993). Strategic Planning. New York: American Management Association.*

Part #3 Meeting Guidelines for SCC Strategic Planning

Stage #1: Information Gathering & Exploring

Purpose

- To gather information about Salem Community College and your respective area of general concern.
- To appreciate what has previously been accomplished in this area, to build on the past, and to improve and excel.
- To review information/data about Salem Community College in general and about your Planning Team's charge in particular.
- To identify the external opportunities and threats that exist for Salem Community College in general and your Planning Team's charge in particular.
- To identify assumptions about the future of Salem Community College in general and your Planning Team's charge in particular.

The Planning Team

- Gathers information about the charge.
- Examines information provided by the Institutional Research and Planning Office.
- Requests additional information from the Institutional Research and Planning Office when appropriate (Worksheet #3, p. 20).
- Identifies external opportunities and threats.
- Makes assumptions about the future of Salem Community College in general and their Planning Team's charge in particular.

***Expected Outcome**: "Based on the Planning Team's assumptions, the specific issues that this strategic plan must address are ..."*

Meeting #1

Preparation

- All Planning Team members are to bring their Strategic Planning Workbook and their SCC information to all of the meetings.
- Each member should come prepared to discuss the information/data provided by the Institutional Research and Planning Office.
- Members should complete appropriate worksheets prior to the meeting (#3, #4, & #5, pp. 20-22).

Discussion

- **The Team Lists on Newsprint**
  - What external opportunities exist beyond the internal college community that could help us carry out the mission of SCC?
  - What external threats exist beyond the internal college community that should be addressed to help us carry out the mission of SCC?
  - What are our assumptions about the future of SCC in relation to our charge? (Brainstorm)
  - Can we verify these assumptions, opportunities, and threats based on the information provided to us by the Institutional Research and Planning Office?
  - Are their additional sources of information that we need to consult?

Decision Making

- What opportunities does the team believe exists here?
- What threats does the team believe exists here?
- What are the valid and verified assumptions that the team believes will influence the progress of SCC over the next 3-5 years?

Responsibility

- The chair identifies information that is needed for the next meeting.
- The chair designates one person to bring the additional information needed from the Institutional Research and Planning Office to the next meeting.

Meeting #2

Preparation

- Each team member will complete appropriate Worksheets (#6, #7, #8, pp. 23-25).
- Each team member will review his/her notes from previous meeting.
- Each team member will be prepared to identify the internal strengths and weaknesses of Salem Community College.
- The designated team member will bring either the information or a report on its availability from the Institutional Research and Planning Office.

Discussion

- **The Team Lists on Newsprint**
  - What internal strengths exist that help us carry out the mission of SCC?
  - What internal weaknesses exist that should be addressed to help us carry out the mission of SCC?
  - What are our assumptions about the future of SCC in relation to our charge, the external threats and opportunities, and the internal strengths and weaknesses? (Brainstorm)
  - Can we verify these assumptions, strengths and weaknesses based on the information provided to us by the Institutional Research and Planning Office?

Decision Making

- What strengths does the team believe exists here?
- What weaknesses does the team believe exists here?
- Given all of the information/data and discussions, are there any other valid and verified assumptions that the team believes will influence the progress of SCC over the next 3-5 years?

Responsibility

- The chair identifies and lists all of the External Threats, External Opportunities, Internal Strengths, and Internal Weaknesses (SWOT).
- The chair designates one person to type these lists in MS Word and deliver a copy of this file to the Director of Institutional Research and Planning; and to bring a copy of the lists to the next meeting.
- The Chair distributes handout on SWOT (Situational) Analysis.

INFORMATION GATHERING

Worksheet #3:

Additional Information Needed from the Institutional Research and Planning Office

INFORMATION GATHERING

Worksheet #4:

External Opportunities to the College Relating to Our Charge

1.
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INFORMATION GATHERING

Worksheet #5:

External Threats to the College Relating to Our Charge

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INFORMATION GATHERING

Worksheet #6:

Internal Strengths of the College Relating to Our Charge

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INFORMATION GATHERING

Worksheet #7:

Internal Weaknesses of the College Relating to Our Charge

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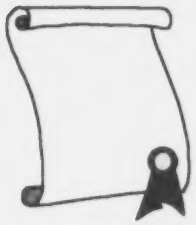
15.

INFORMATION GATHERING

Worksheet #8:

The Most Critical Assumptions that this Plan should address are:



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Stage #2: Identifying and Assessing Alternative Actions (Meetings should be after 2/25/99)

Purpose

- To affirm and understand the revised vision and mission of Salem Community College (if necessary), the general expectations that each planning team should address, and the characteristics of a vital and vibrant mission driven community college.
- To identify and prioritize common goals for the Planning Team's charge.
- To begin to develop a list of alternative actions (GOALS: strategies: objectives) to achieve these common goals.

The Planning Team

- Understands, accepts, and embraces the SCC Vision and Mission Statements.
- Identifies and prioritizes common goals for the Planning Team's charge.
- Begins to develop a list of alternative actions to accomplish these goals.

***Expected Outcome**: "The Planning Team has identified these common goals and we propose a range of alternative actions (strategies objectives) including..."*

Meeting #3

Preparation

- Examine and become familiar with the situational analysis process using external opportunities and threats, internal strengths and limitations with respect to the Planning Team's charge.
- Review notes from training session on conducting a SWOT (Situational) Analysis.
- Review Worksheets #9, #10, #11, #12 (pp. 28-31), complete as an individual and come prepared to complete as a team.

Discussion

- The Planning Team chair will review the (SWOT) situational analysis methodology and review handout supplied by Institutional Research and Planning Office.
- The Planning Team Chair will review Worksheets #9-#12 (pp. 28-31).
- The Planning Team will discuss each of the Worksheets in detail, identifying alternative actions that may be necessary based on the situational analysis.
- The Team will develop a set of alternatives that cover the four areas:

    1. Grow/Invest
    2. Invent/Improvise/Reallocate
    3. Add/Build
    4. Transform/Merge

(Note that, no alternatives for a given area is a legitimate response).

Decision Making

- Using the multi-vote process (covered in the training session and glossary) the group will come to consensus on a list of twenty prioritized alternative actions (goals/strategies/objectives).

Responsibility

- The Planning Team Chair will prepare the list of the prioritized alternative actions (goals/strategies/objectives) and a report on the Team's progress to date for distribution and discussion at the March 25, 1999 Board of Trustee Meeting.
- The Planning Team Chair will summarize response of Board, President, and other Planning Team Chairs, and return a response summary to team members prior to next meeting.

Worksheet #9 - Identifying Alternative Actions

"We must care and protect."

Internal Strengths (+,)

1.

2.

3.

External Opportunities (,+)

1.

2.

3.

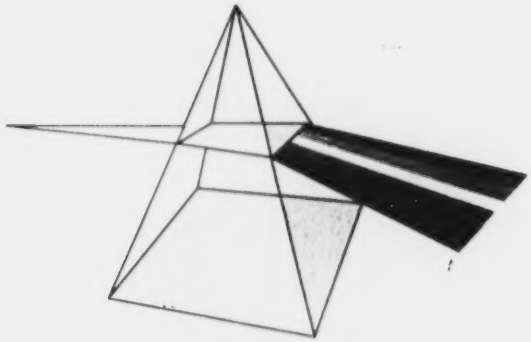
4.

I. Grow, Invest (+,+)

1.

BEST COPY AVAILABLE

Worksheet #10 - Identifying Alternative Actions



"We must try something new."

Internal Strengths (+,)

1.

2.

3.

External Threats (, -)

1.

2.

3.

4.

II. Invent, Improvise, Reallocate (+, -)

1.

Worksheet #11 - Identifying Alternative Actions

"We must add to our College."

External Opportunities (,+)

1.

2.

3.

4.

Internal Weaknesses (- ,)

1.

2.

3.

III. Add , Build (- , +)

1.

Worksheet #12 - Identifying Alternative Actions

"Let's work together."

External Threats (, -)

1.

2.

3.

4.

Internal Weaknesses (- ,)

1.

2.

3.

IV. Transform, merge (- , -)

1.

Stage #3: Creation of Criteria for Choosing Alternatives for Action

(Meetings begin after 3/25/99)

Purpose

- To consider and revise the goals in light of Board of Trustee Meeting discussions.
- To develop criteria that must be met by any proposed alternative actions (goals/strategies/objectives)
- To test the proposed alternative actions against the criteria.
- To develop additional alternative actions that meet the criteria and eliminate alternative actions that do not meet the criteria.

The Planning Team

- Considers the response of other Planning Team Chairs, The President, The Board of Trustees, and the Director of Institutional Research and Planning regarding the alternative actions, and revises these goals as needed.
- Develops criteria for testing the feasibility of proposed alternative actions (goals/strategies/objectives).
- Tests the proposed alternative actions against the criteria.
- Revises actions, adds and eliminates actions as needed.
- Identifies alternative actions for future structures, activities, services, and programs in relation to the defined charge in particular and SCC in general that are, ideally, both desirable and feasible.
- Creates a final list of proposed alternative actions (goals/strategies/objectives) that have been tested against the criteria and reviewed at the Board of Trustee Meeting for the development of strategic planning initiatives.

***Expected Outcome**: "We, the Planning Team, submit these proposed goals and alternative actions to accomplish the College's goals in the form of specific objectives and strategies to achieve them..."*

Meeting #4

Preparation

- Review the outcomes, worksheets, and notes from Stages #1 & #2.
- Review the comments and suggestions from the March 25, 1999 Board of Trustee Meeting.

Discussion

- The Planning Team reviews outcomes of Stages #1 & #2, within the context of the Board Meeting responses, and considers if any change should be made to the identified alternative actions in light of these discussions.
- The Team comes to final consensus about the alternative actions (goals/strategies/objectives), the final alternatives are posted on newsprint.
- The Team identifies essential criteria (Worksheet #13, p. 35) for testing the proposed alternative actions.

Decision Making

- Planning Team members use newsprint and post the alternative actions and criteria, walk past them and mark those they support. The Team comes to a final consensus on the goals and criteria that they support.

Responsibilities

- Review the final list of alternative actions **(GOALS: objectives: strategies)**
- Review the list of essential criteria that were identified as part of this meeting.

Meeting #5

Preparation

- Review the final list of Goals of the Team.
- Review the list of criteria identified at the previous meeting.
- Complete Worksheet #14 (p. 36) as an individual and come prepared to discuss your rationale.

Discussion

- The Planning Team finalizes the essential criteria through multi-voting and consensus.
- The Planning Team tests the alternative actions against the criteria, and prioritizes a set of no more that five alternative actions to be implemented over the next 3 years.

Decision Making

- From the final list of alternative actions (GOALS: objectives: strategies), the Planning Team will come to consensual agreement on at least three and no more than five proposed goals that meet the criteria established, further the mission of the College, move the institution toward its vision, and receive support of the entire college.

Responsibilities

- The Planning Team Chair works to move the group through the process to a level of consensual agreement.
- The Planning Team Chair creates a final formal list of GOALS to be met, objectives to be accomplished to fulfill goals, and a set of strategies to meet the objectives; which are delivered to team prior to next meeting (Worksheet #15, p. 37).

Worksheet #13 - Creating Criteria & Choosing Alternatives

The Essential Criteria are:

-
-
-
-
-
-
-
-
-
-

Worksheet #14 - Creating Criteria & Choosing Alternatives

The following alternatives seem to have priority:

-
-
-
-
-
-
-
-
-
-
-
-

Creating Criteria & Choosing Alternatives

Worksheet #15

GOALS that meet the Criteria Test are in this Order of Priority

-
-
-
-
-

Stage #4: Proposal Development & Planning (To be completed by 4/22/99)

Purpose

- To draft a portion of the SCC Strategic Plan based on the elements of the particular charge of this Team. Identifying Goals, Narrative Explanations, Potential Outcomes, Measurement Vehicles, Timelines, Possible Strategies, Reason for Selecting Strategies, Responsible Parties, and a Summary of Actions to be Taken & Resource Requirements.
- To share the draft portion of the plan with the Board of Trustees, President, other Planning Team Chairs, and college review committee (made up of non active planners of college personnel).
- To revise the plan as needed and submit the Team's portion of the plan to the Director of Institutional Research and Planning, who will compile the final document and present it to the Board and the President for implementation.

The Planning Team

- Considers all of their work to date and develops a planning component that includes:
    1. Goals
    2. Explanatory Narrative of the goal's importance
    3. Anticipated Outcomes
    4. Procedure for Measuring the success of the plan.
    5. Explanation on how goal will improve the college's effectiveness or efficiency.
    6. Timeline
    7. Chosen Strategies for reaching the goal
    8. Responsible Persons
    9. Summary of Action Plans and Resource Requirements.

(See Part #4 for detailed description)

***Expected Outcome**: "We propose the following plan of goals and objectives. We propose that the following actions be taken by the College that will help us reach our vision and fulfill our mission: "*

Meeting #6 & #7 (Prior to 4/22/99)

Preparation

- Review the final list of GOALS to be met, objectives to be accomplished to fulfill goals, and a set of strategies to meet the objectives (Worksheet #15, p. 37).

- Be prepared to identify and review:
    1. Goals
    2. An Explanatory Narrative of the goal's importance
    3. Anticipated Outcomes
    4. Procedure for Measuring the success of the plan.
    5. Explanation on how goal will improve the college's effectiveness or efficiency.
    6. Timeline
    7. Chosen Strategies for reaching the goal
    8. Responsible Persons
    9. Summary of Action Plans and Resource Requirements.

Discussion

Meeting #6

- The Planning Team Chair works to develop a consensus on each of the nine plan components identified above.
- Two Team members volunteer to take notes and compose a first draft of the plan, following the template presented in PART #4: Strategic Plan Format (Template)

Meeting #7

- The Planning Team reviews the draft and makes necessary revisions for presentation at the April 22, 1999 Board of Trustee Meeting.

Decision Making

- A general consensus on the Goals, Narrative Explanations, Potential Outcomes, Measurement Vehicles, Timelines, Possible Strategies, Reason for Selecting Strategies, Responsible Parties, and a Summary of Actions to be Taken & Resource Requirements is reached by the Planning Team.
- Consensus on plan drafters is reached.
- A draft formal written document is created.

Responsibilities

- The Planning Team Chair is responsible for bringing the group to consensus on Goals, Narrative Explanations, Potential Outcomes, Measurement Vehicles,

Timelines, Possible Strategies, Reason for Selecting Strategies, Responsible Parties, and a Summary of Actions to be Taken & Resource Requirements.

- The volunteer plan drafters are identified, and they develop both the first and second drafts.
- The Chair makes revisions as deemed necessary at the Board of Trustee Meeting.
- The Chair delivers both a paper copy of the document and a copy on diskette to the Director of Institutional Research and Planning.
- The Director of Institutional Research and Planning compiles the first draft of the SCC Strategic Plan, incorporating the work of the Planning Teams. The Director returns the first draft of the SCC Plan to the Planning Team by May 3, 1999.

Meeting #8 (Scheduled between 5/3/99 and 5/25/99)

Preparation

- Review entire SCC Strategic Plan, noting in particular the Team's charge and its relation to other goals of the college and the SCC Mission.

Discussion

- Make recommendations on further revisions to the SCC Strategic Plan

Decision Making

- Come to consensual agreement on the SCC Strategic Plan.

Responsibility

- The Chair helps the team reach consensus.
- The Chair delivers the recommended revisions at the May 27, 1999 Board of Trustee Meeting.
- The Director of Institutional Research and Planning in consultation with the President, draft the Final SCC Strategic Plan (June 14, 1999).

Part #4: STRATEGIC PLAN FORMAT (TEMPLATE)

The following template is designed to provide you with a standard framework for developing your Planning Team's area of concentration. The following template should be followed as to ensure consistency throughout the Planning Teams:

You will complete an entire template for each of the goals you have selected to be part of the strategic plan (at least 3, but no more than 5).

GOAL #1: ***(TEAM CHARGE)***

State your first goal here (each goal should be listed and developed in this template separately).

EXPLANATORY NARRATIVE

In a single, detailed, concise paragraph explain why this goal is important. Explain the external opportunities and threats, internal strengths and limitations that were considered. Finally explain the criteria you tested this goal against.

ANTICIPATED OUTCOMES

List the potential outcomes that will be generated by the successful completion of this goal.

MEASUREMENT VEHICLE

List the measurement tools, instruments, or methods that will be used to assess the successful completion of this goal.

EFFECTIVENESS & EFFICIENCY

Explain how the successful completion of this goal will improve the college's effectiveness and efficiency.

TIMELINE

Report a timeline for the accomplishment of this goal. Be as specific as possible.

STRATEGIES

Report the strategies that will be necessary to implement to accomplish this goal. Use the following format:

MISSION FULFILLMENT: Describe how this goal fulfills the mission in a sentence.

OBJECTIVE A: _____
Strategy: _____
Activity a: _____
Activity b: _____

OBJECTIVE B: _____
Strategy: _____
Activity a: _____
Activity b: _____

RESPONSIBLE DEPARTMENT or PERSON

List those departments and/or position titles who will be responsible for the successful implementation of the goal.

SUMMARY OF ACTION AND RESOURCE REQUIREMENT

In a narrative form describe this goal and the actions necessary to successfully accomplish this goal. In addition, indicate any additional operational costs to the institution to implement this goal (i.e., new hire, money for program, new department, etc.).

"Give me a level long enough . . . and single-handed I can move the world," a simplistic expression of common sense, details how we can change our world and our organization. To this end, you will want to make a plan detailed enough to make SCC more successful. Still, be aware of another not so famous metaphor: "Give me a plan simple enough . . . and it might actually happen." Please limit your entire written plan to two pages per goal; be detailed, simple, and concise. More detail will be provided at the departmental level, this planning document should be written to be easily understood by a high school graduate (as they represent most of our customers/clients/students).

APPENDIX A:
General Expectations and Principles that Guide the Planning Process

The general expectation of every Planning Team is that it promote the best interest of Salem Community College above any individual or departmental agenda. Through this process all of the members of the Planning Team are expected to become more aware of the elements that influence the life of Salem Community College, and why some decisions are chosen over others. The SCC Strategic Plan is intended to describe how the college will excel and succeed in its endeavors and become increasingly vital to the Salem County community over the next three to five years.

It is expected that for Salem Community College to be successful it must accept the recommendations of its Planning Teams, and integrate its resources and leadership to become a more synergistic enterprise. To this end, it is important that each Planning Team member be an advocate of proper planning and proper procedural implementation. Use the following checklist to check the process for accuracy and validity:

_____ Have we asked the fundamental questions?
_____ Have we completed a complete situational analysis?
_____ Have we chosen the right subjects to investigate in the situation analysis?
_____ Have we correctly interpreted data from the situation analysis?
_____ Did we correctly estimate the time it takes to plan and the cost of the plan?
_____ Did we have and follow the planning manual (Workbook)?
_____ Did we adequately communicate the strategic planning process to all participants?
_____ Did we include all stakeholders in the planning process or at least periodically communicate its progress to them?
_____ Did we not copy the plan or planning process of another organization.
_____ Did we not create too much paperwork?
_____ Did we pay careful attention to the time factor in strategic planning.
_____ Did we select the right objectives?
_____ Did we allocate the necessary amount of resources?

If at any time, you as a participant feel these objectives are not or were not met, please alert your Team members.

APPENDIX B: Glossary of SCC Strategic Planning

Action – process of doing or performing in a specific way to produce a desired effect or to achieve an objective.

Alternative – an idea expressed in the form of objective(s) and actions intended to move the college closer to the goal(s) identified by the Planning Team and the SCC Mission.

Brainstorming – a method for generating ideas that allows everyone on a team to speak and encourages everyone to listen. All ideas are to be evaluated at a later time.

Consensus – a process of arriving at a decision after a time of thoughtfulness and study; characterized by a general agreement as opposed to a majority vote; results in the recommendation that all, or nearly all, of the members of the Planning Team agree to accept and support the decision.

Decision Making – the act of choosing one alternative from among more than one. The decision making process includes recognizing and defining the nature of the decision situation, identifying alternatives, choosing the "best" alternative, and putting the decision into practice. A decision making group may be most effective when members openly discuss and agree on the best alternative.

Facilitator – a person identified to have the responsibility of keeping the Planning Team clearly focused on the discussion at hand and in an ordered, purposeful way so that the Team members' time together is more productive.

Goal – the establishment of specific targets, a purpose toward which an endeavor is directed, a desired end or achievement.

Group – two or more individuals in face-to-face interaction, each aware of his or her membership in the group, each aware of others who belong to the group, and each aware of their positive interdependence as they strive to reach mutual goals.

Mission – a description of the service provided and the task that is faced, who we service, the forces we have to contribute, and the medium in which we operate. Our day to day job.

Multi-voting – a method of reducing a list to the most important issues by allowing each member a number of choices (usually about 1/3 of the total on the list) and reorganizing those items that all or most of the group identify as important.

Objective – devising ways to meet your goals, the purpose or aim of a specific action, something to be worked toward as a step in accomplishing a goal.

Planning – a process of selecting a rational course of collective action to achieve a future state of affairs. It includes setting goals, gathering and analyzing information, evaluation information, making decisions, and acting.

Planning Team Chair – senior staff member identified by the President to serve as the chairperson of a specific Planning Team.

Priority – an established sequence by order of importance or urgency.

Resources – something that can be looked to for support or aid of college vitality; available assets, operational budgets, enrolled students, personnel, community members, number of faculty, community size, the number and usefulness of buildings, the current and future financial situation, other institutions in the community associated with the mission of the college, etc.

Salem Community College Mission Statement – a concise expression of the college's fundamental purpose.

Situational Analysis (SWOT) – a precise and careful look at the community and its environment to determine the primary external opportunities and threats, and the primary and related internal strengths and weaknesses.

Strategies/Activity – ways or methods of meeting objectives.

Vision – a direction or path that sets the pace for excellence in an organization. What you hope to achieve.

APPENDIX C: Tips on Writing Proposals & Plans[3]

An important point in developing strategic plans is to keep the paperwork to a minimum and to make sure that what is written is clear. Some common complaints about written business communications are that they are too long, irrelevant, confusing, and/or indecisive. For the purposes of the SCC Strategic Plan, please follow these guidelines:

1. Avoid excessive verbiage.
2. Don't repeat yourself.
3. Avoid multisyllable words when possible.
4. Make sure that what you write is relevant to the issue at hand.
5. Avoid jargon.

Listed below are often used words that are unnecessarily complex and will easily confuse the average reader. Many writers, including the writer of this workbook, use these words too often. Don't be one of them.

transitory	interdepartmental	confrontation
unilateral	tangential	interaction
salient	participatory	transmission
compensatory	transcribed	interface
immobile	transglobal	counterpoint
generalistic	congruent	briefing
unified	codified	exchange
tertiary	studied	continuation
intermittent	reactionary	reiteration

As an example choose one word from each column maker a three word phrase, then try to explain it to someone.

Or try to find these words in this manual, this may help you read through it.

Finally, try to follow the template identified in Part #4, this will allow all Planning Teams to combine their efforts into an institutional strategic plan.

[3] *Revised from Juranski, J. (1993). Strategic Planning. New York: American Management Association. (pp. 126-127).*

APPENDIX D: Meeting Evaluation Form

1) How would you rate the effectiveness of this meeting?

__ Excellent __Very Good __ Good __Needs Improvement

2) Where we able to resolve differences in perception and meet consensus?

_____ Yes _____No

3) Are we working efficiently to meet the goals of the planning process?

_____Yes _____No

4) Are we following the manual and completing the tasks set forth in it?

_____Yes _____No

5) How well did I listen to others today?

Areas of Excellence in Meeting Process: _____

_____

Areas in Need of Improvement in the Meeting Process: _____

_____

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